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Profile of the Montana Worker

2001

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Department of Labor & Industry

8th Annual

Labor Day Report

August 2001
Research & Analysis Bureau
Workforce Services Division
Montana Department of Labor & Industry

Profile of the Montana Worker

State of Montana
Judy Martz, Governor

Department of Labor & Industry
Mike Foster, Commissioner

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From the Governor

Office of the Governor
State of Montana

Judy Martz
Governor

State Capitol
Helena, Montana 59620-0801

Friends:

This is my first Labor Day celebration as governor of our great state. I want to take this opportunity to thank the Montana businesses whose participation in the Department of Labor and Industry's surveys is vital in producing this publication and giving us an accurate picture of Montana's labor and economic situation. The Eighth Annual Profile of the Montana Worker publication is a tool to see how Montana compares with the rest of the nation economically and shows us where we can improve.

As your governor, I'm determined to improve Montana's economy and provide better-paying jobs for those Montanans who love this state and want to continue to live, work and raise their families here. To accomplish this goal, I have established the Office of Economic Opportunity charged with creating an economic growth plan for Montana, recruiting new businesses to the state and expanding existing businesses. Montanans are some of the best and brightest workers in the nation with positive attitudes and work ethic. We need to capitalize on these strengths in order to attract better-paying jobs and continue growing existing businesses while protecting our beautiful environment.

Let's join together in growing and expanding our economy, providing quality education that will prepare our citizens to be leaders in the new economy, and most importantly, sending a message both inside and outside of our great state that Montana is open for business.

This Labor Day please join me in honoring Montana's 480,000 civilian workers whose strong work ethic fuels our economy, the employers who provide them employment, and their families who bring focus and commitment to their lives. I want especially to thank the Department of Labor and Industry and Commissioner Mike Foster for their continued dedication in serving Montana's workers and employers.

Sincerely,

Judy Martz

JUDY MARTZ
Governor
Telephone: 406-444-3111 Fax: 406-444-5529

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Profile of the Montana Worker

Overview . . .

OVERVIEW

Montana continues to experience positive growth in population, employment and income. More people are living in Montana, more are working, and those working are earning more money. This growth, however, is not spread evenly across the state.

Statewide, 1999 to 2000

Estimated employment (including self-employed) increased just under 2 percent, or about 10,000 jobs, 2000 compared with 1999. At the same time, the unemployment rate declined from 5.2 percent of the workforce in 1999, to 4.9 percent in 2000. The 2000 unemployment rate was the lowest since the early 1970s when it was 4.8 percent. Unemployment declined even further over the first half of 2001 so that for Fiscal Year 2001 (July 2000 through June 2001), unemployment averaged about 4.7 percent. This is the lowest rate since the calendar year 1970 figure of 4.3 percent. The rate of unemployment has basically declined in Montana and the U.S. since 1983.

According to preliminary information, Montana's total personal income increased by 4.9 percent in 2000, more than the inflation rate of 3.4 percent. Average income per person—per capita (personal) income possibly also increased. The amount is unknown since 1999 population is yet to be revised upward, in light of the higher than expected population numbers from the 2000 Census, both in Montana and generally nationwide. With a larger 1999 population, per capita income for 1999 will be revised downward. The growth in employment coupled with a decline in unemployment, indicates that the economic welfare of Montanans, on the average, improved in 2000.

Statewide, 1990 to 2000

Taking a longer view, the population of Montana increased by about 103,000 between 1990 and 2000, or 12.9 percent. The experience of the 1990s was in sharp contrast to the 1980s, when total Montana population increased by only 12,000.

The 2000 population was much older, on average, than the 1990 Montana population. Median age increased to 37.5 years as compared with 33.8 years in 1990. The U.S. median age was 35.3 years in 2000. Montana's median age was higher than the U.S median, primarily because Montana had a larger proportion of people 45+ years old, along with fewer people 25-34 years old, and less than 10 years old.

The increase in the principal working age population (16-64) was about 87,000 between 1990 and 2000. The baby-boom generation (age 35 through 53 in year 2000) accounted for almost half (46 percent) of the prime working age population in 2000. A small portion of the leading edge of this group is starting to retire and leave the workforce. This will accelerate over the next 10-15 years. The baby-bust group (age 23-34 in 2000), are fewer in number and are at an age of high participation in the workforce. The echo-boomers (age 5-22 in 2000) are working their way through school and entering the labor force. The echo-boomers are smaller as a group as compared with boomers partially because of declining birth rates. A portion of the oldest members of this group started entering the workforce about 1994. Members of the echo baby-busters (less than age 5 in 2000) are either just entering school, waiting to enter school, or to be born. The labor force participation of this smaller group will start about 2012, the same time as the leading edge of boomers reaches age 65.

On the employment side, total jobs (including self-employed) increased by approximately 125,000 from 1990 to 2000; the payroll jobs increase was about 88,000. The yearly jobs growth rates averaged 2.6 and 2.4 percent, respectively.

Uneven Population Growth Across the State

Over the 1990s, population growth was uneven across Montana. Between 1990 and 2000, 23 of Montana's 56 counties lost population, while 33 others experienced growth. Nearly all the counties losing population were in the eastern third and north central part of the state (see map on page 6). Anaconda-Deer Lodge County in the western third of the state was the exception, declining 9 percent. This county has declined in population since 1960. Nineteen counties (all in the western third and south central portion of the state) experienced more than 10 percent population growth.

Uneven Employment Growth Across the State

Employment growth also was uneven across the state. For the period 1990-1999, the 9 largest counties in employment (Yellowstone, Missoula, Gallatin, Cascade, Flathead, Lewis and Clark, Silver Bow, Ravalli and Lake) accounted for about four-fifths of the growth in total jobs (includes self-employed). The other 47 counties combined were responsible for only about one-fifth. Blaine, Phillips and Treasure counties actually declined in job count. If one excludes self-employment jobs, then Carter, Judith Basin, Lincoln, Powder River, Prairie, Rosebud and Sheridan counties join the list of counties with a job decline, 1990-1999.

For payroll jobs just covered by the unemployment insurance program (excludes self-employed, most of production agriculture, work-study jobs in higher education, railroads, the military and elected officials) for the period 1999-2000, 31 counties increased in employment, 4 stayed the same, and 21 counties declined. Five counties accounted for 86 percent of the total statewide net increase of about 8,000 payroll jobs. These were: Gallatin, Flathead, Missoula, Yellowstone and Lewis and Clark.

Gallatin County, the third largest county in total jobs since 1999, increased by about 1,900 payroll jobs, and had the second highest growth rate at 5.9 percent. Stillwater County's rate was higher at 6.9 percent, largely as the result of the well-publicized expansion of the palladium/platinum mine in that county. Gallatin County's employment increase was concentrated in services (including high-tech computer services), on the Montana State University campus, in retail trade and construction.

For Flathead and Missoula counties, the increase was roughly 1,600 jobs, concentrated in services (including high-tech), retail trade and construction. The increase in services for Flathead County was primarily the result of the well-publicized location and expansion of Stream International, a computer-related call center. Increases in employee-leasing services, along with manufacturing, were also important for Flathead County. Health services contributed to the increase for Missoula County, not true for Flathead.

For Yellowstone County, payroll jobs increased by approximately 1,100. Growth was concentrated in services, especially in the employee-leasing segment, along with health services and high-tech services. Because Yellowstone County is the largest employing county in Montana, the 1,100-job increase translated into a more modest 1.8 percent growth rate.

In the case of Lewis and Clark County, about 800 jobs were created. These were mostly in retail trade (general merchandise stores) and the state government sector. The state government increase was largely related to forest fires.

Silver Bow County (Butte plus Walkerville) led the group of 21 declining counties with a decline in payroll jobs of 330 jobs (2.3 percent). The well-publicized closure of the Montana Resources copper mine was a major part of this decrease, along with the equally-publicized restructuring of the electric/gas services industry. Jefferson County suffered a job loss of about 80 (3.7 percent), basically related to the reported lay-offs at the Golden Sunlight mine. Lincoln County also declined in payroll employment by about 80, mostly related to a decrease in manufacturing employment, including wood products. Fergus County declined by 75 jobs, mostly in retail trade; and Roosevelt County declined by 60 jobs, 55 of which were in manufacturing.

Geographic Uneven Incidence of Unemployment

The incidence of unemployment is also distributed unevenly across Montana. For calendar 2000, 11 counties had a relatively high unemployment rate of above 7 percent, with Big Horn County being the highest at 14.4 percent (see map on page 18). This compares with 13 counties in 1999 that had unemployment rates above 7 percent. Fifteen counties had low rates below 4 percent (the national average rate), with Carter County being the lowest at 2.1 percent. Of the 11 high unemployment counties, 5 were counties with Indian reservations, where historically employment opportunities have been limited. With the exception of Musselshell and Meagher counties, the other counties were in western Montana (Lincoln, Mineral, Anaconda-Deer Lodge and Granite). The economies of these western Montana counties are

partially dependent on seasonal (part-year) industries such as logging and wood processing, recreation and tourism, and construction. The presence of seasonal industries in itself keeps the annual unemployment rate higher than it would be otherwise. Workers are counted as unemployed for the months they are not working due to spring breakup, the off-season for tourism, winter weather and other factors.

According to preliminary data for Fiscal Year 2001 (July 2000 through June 2001), only 10 counties had unemployment rates greater than 7 percent. Musselshell and Meagher dropped to around 6.5 percent. Lake County joined the high group at 7.8 percent, largely as the result of well-publicized layoffs at Jore Corporation in Ronan. Big Horn County's rate increased to 16.4 percent for FY 2001, principally because of reported layoffs by the Crow Tribe. Other counties in the original group of 11 either decreased in the rate of unemployment or stayed at about the same level, with the exception of Granite County, which increased.

Summary

In summary, this report shows growth in Montana's economy and population over the last 10 years, but with some parts of the state not sharing in this growth. The report also shows that for the immediate past period (1999 to 2000), employment increased on average statewide and the unemployment rate decreased. Combined, these factors indicate that the economic welfare of Montanans generally improved in 2000.

August 2001
Research & Analysis Bureau
Workforce Services Division
Montana Department of Labor & Industry

Profile of the Montana Worker

Who We Are . . .

Profile of a Montana Worker

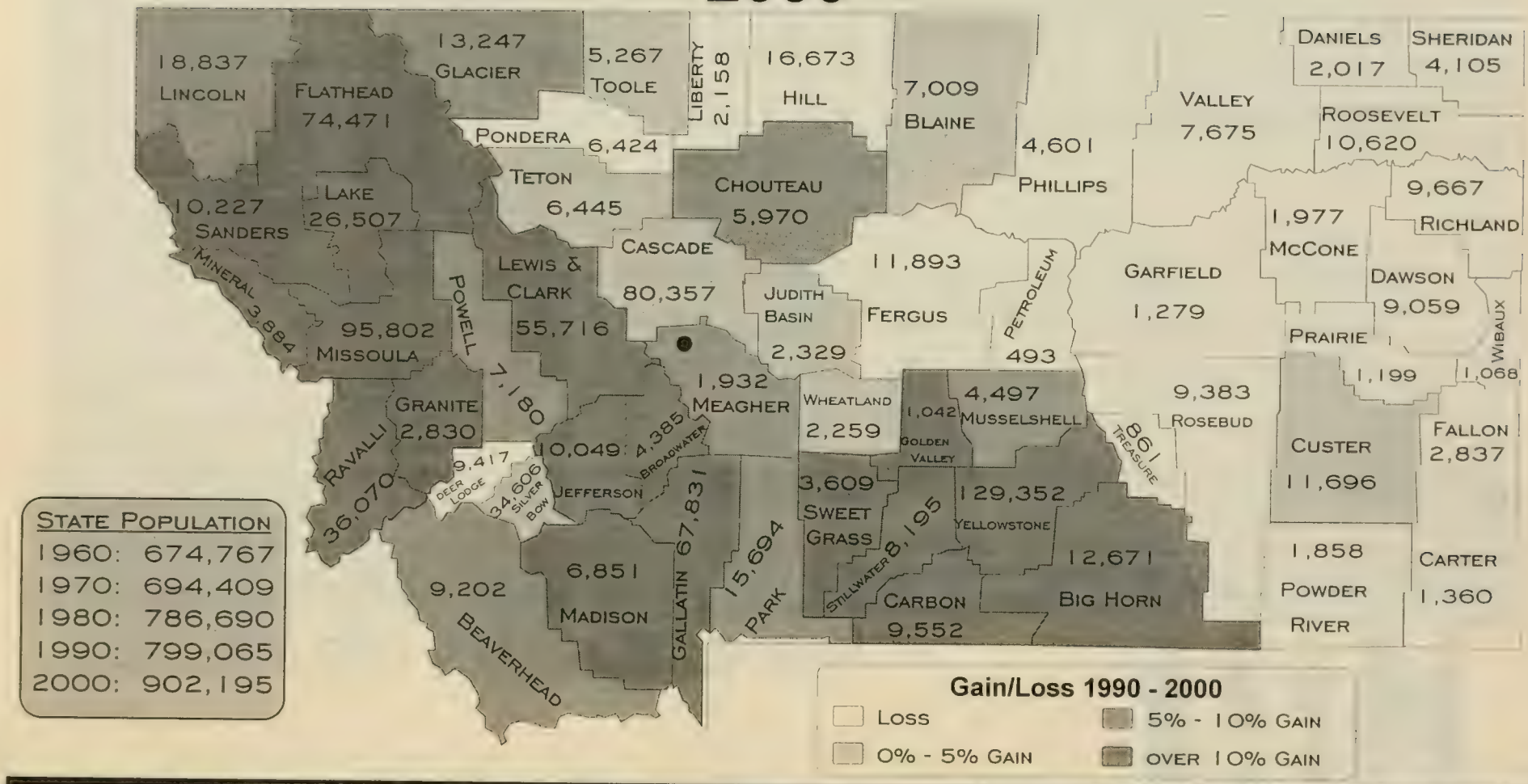
The Average Montana Worker . . .

- has a high school diploma (or equivalent) or some college, no degree
- is a full-time employee of a private-for-profit company
- works in the services sector [for example, as a teacher, child care worker (mostly self-employed) or nurse]; the wholesale/retail trade sector [for example, as a retail salesperson, sales supervisor (owner) or cashier] or the public administration sector [for example, as a general office clerk, secretarial worker, a firefighter or correctional officer]
- earns about $24,000 per year
- is married with a working spouse and one child residing at home
- lives within 16 minutes of the workplace and does not carpool or take public transportation

Data from 2000 Census, 1999 Current Population Survey, Occupational Employment Statistics, Covered Employment & Wages Report, and U.S. Department of Commerce, Bureau of Economic Analysis
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Population

2000



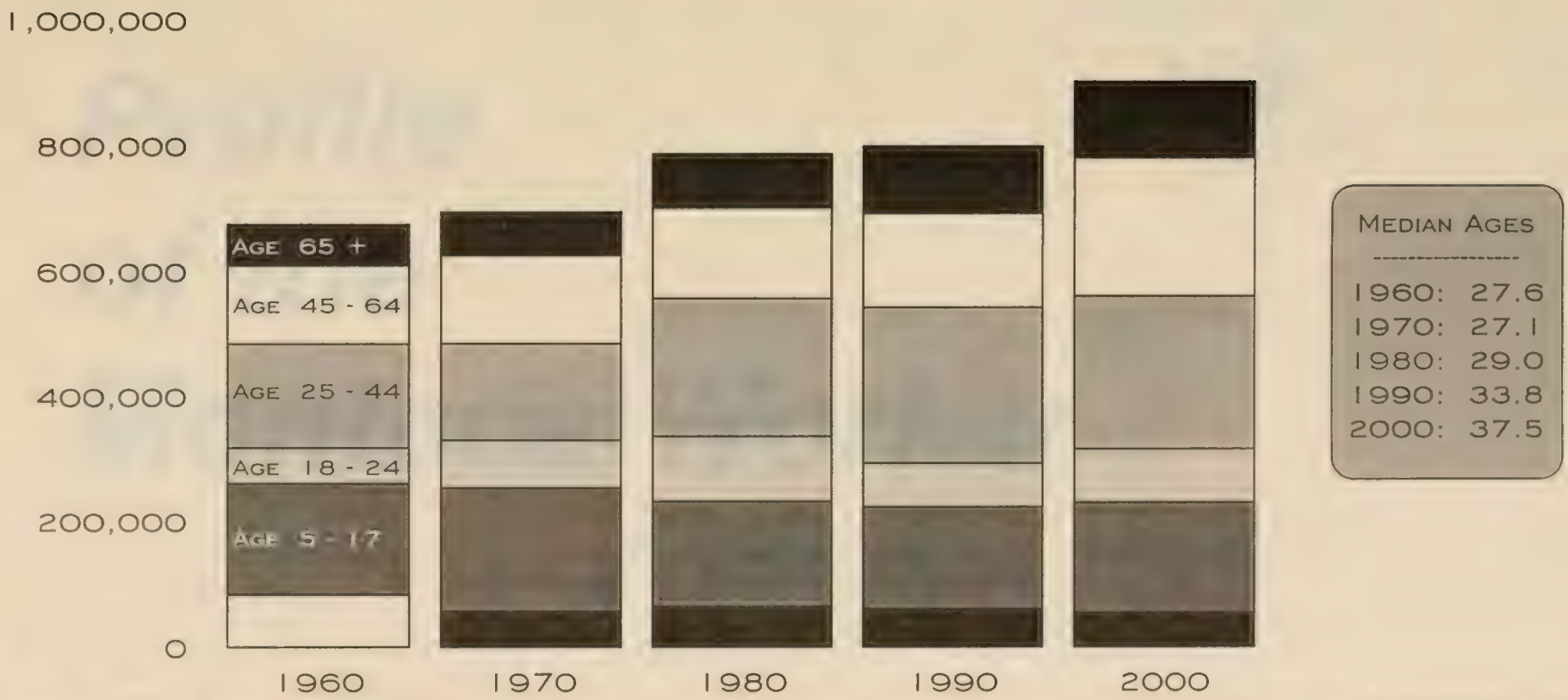
1990 - 2000 State Population Gain: +12.9%

● **Geographic Center of the State's Population 2000***

***Meaning the point at which Montana's population would balance, giving each person's location equal weight.**

Data from U.S. Bureau of the Census
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Age Distribution of the Population
Montana



The age group 45 - 64 is becoming much larger as the baby boom generation (age 35 - 53) gets older.

Data from U.S. Department of Commerce, Bureau of the Census
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

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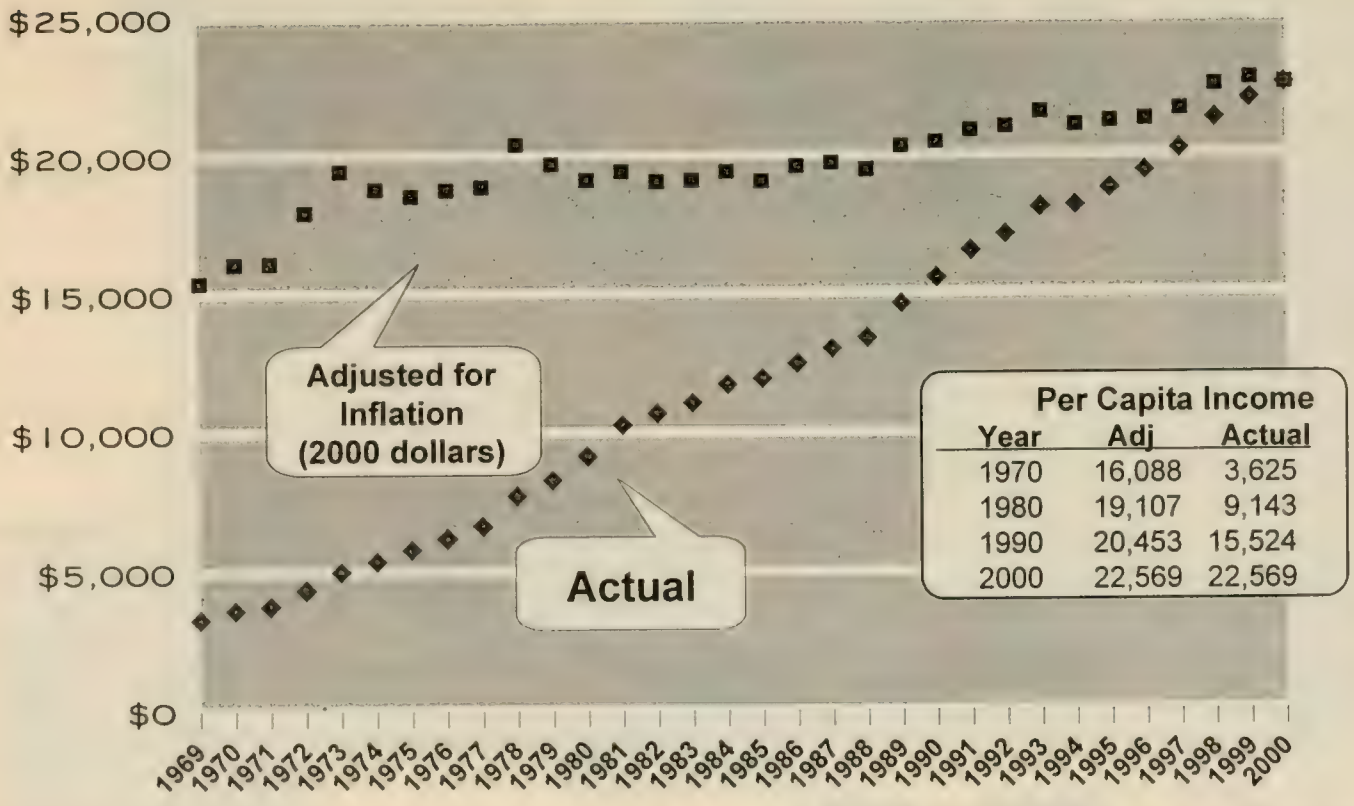
Workforce Services Division
Montana Department of Labor & Industry

Profile of the Montana Worker

What We Earn . . .

Per Capita Personal Income

Montana 1969 - 2000



Per Capita Income		
Year	Adj	Actual
1970	16,088	3,625
1980	19,107	9,143
1990	20,453	15,524
2000	22,569	22,569

INCLUDES:

- WAGE & SALARY INCOME
- EMPLOYER CONTRIBUTION FOR FRINGE BENEFITS
- SELF-EMPLOYMENT INCOME
- RENTAL INCOME
- PERSONAL DIVIDENDS & INTEREST
- TRANSFER PAYMENTS

EXCLUDES:

- PERSONAL CONTRIBUTIONS FOR SOCIAL SECURITY, CAPITAL GAINS, INSURANCE CLAIMS PROCEEDS, ETC.

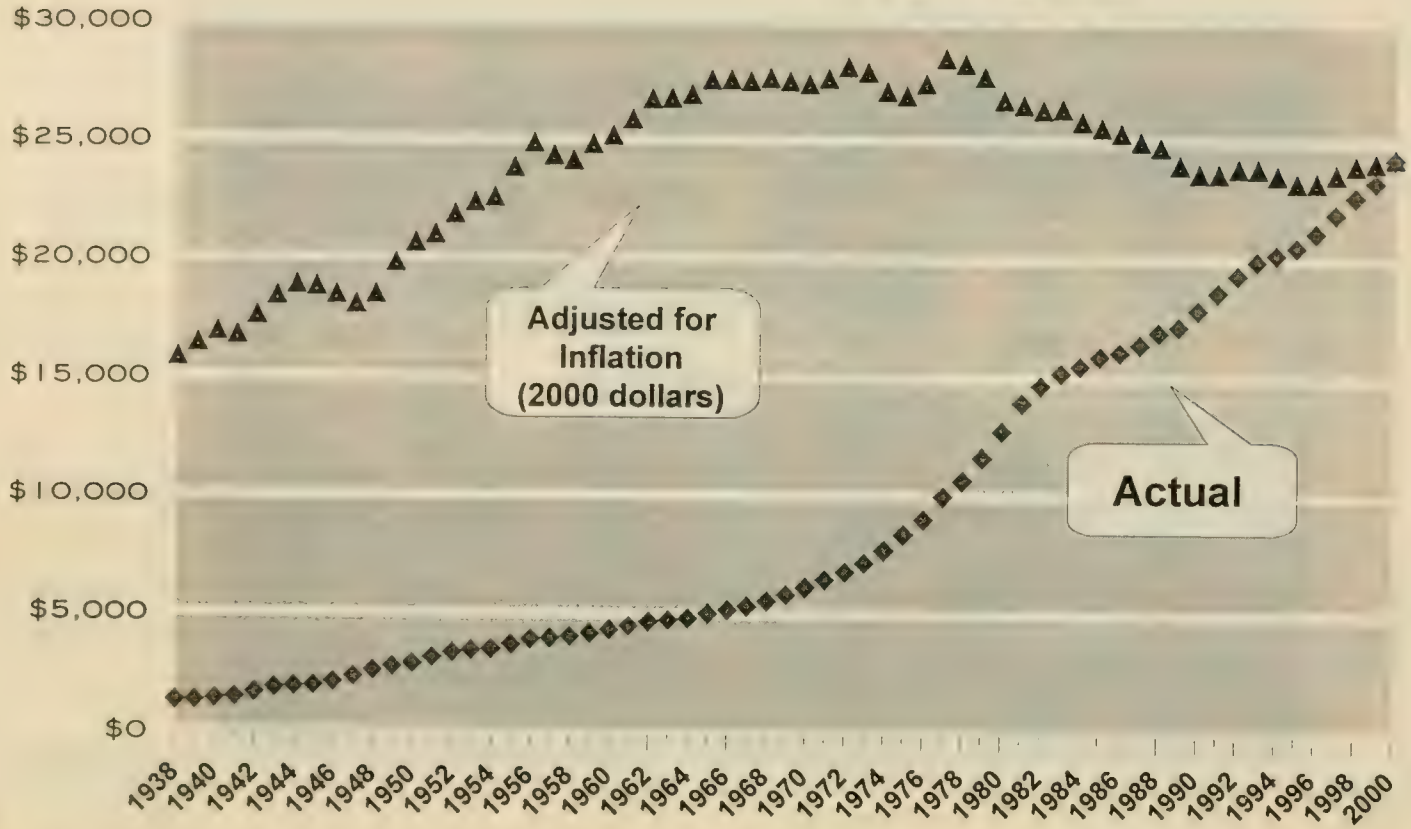
Personal income on a per person basis is growing, even after adjusting for inflation.

Data from U.S. Department of Commerce, Bureau of Economic Analysis
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Average Annual Wage Per Job

Montana Covered Employment*

1938 - 2000



Year	Wage Adj	Wage Actual
1940	16,839	1,369
1950	20,600	2,883
1960	25,114	4,317
1970	27,317	6,155
1980	26,666	12,760
1990	23,563	17,884
2000	24,257	24,257

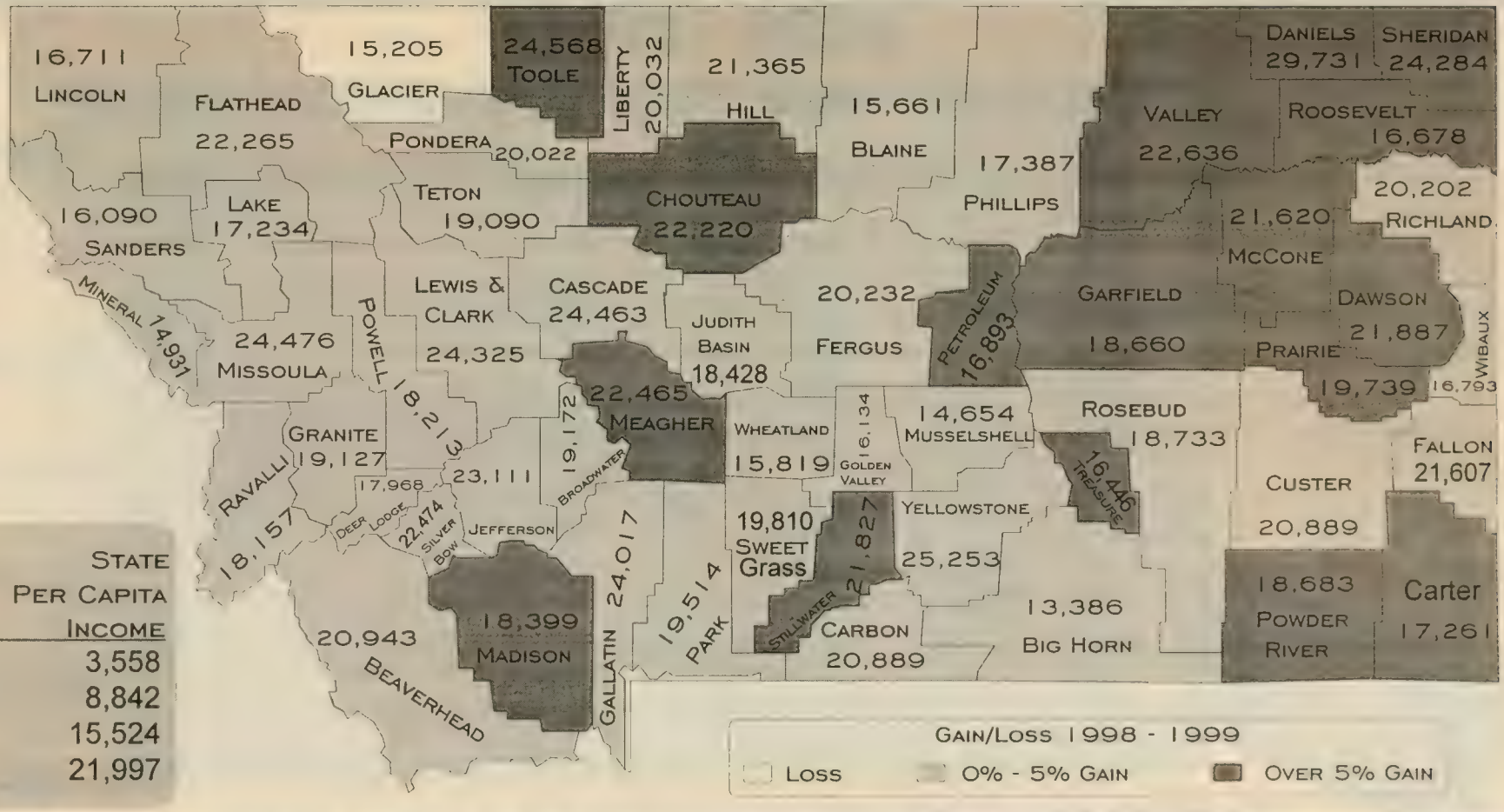
For 1977 to 1995, average wages for payroll jobs generally did not keep up with inflation; since 1995 annual increases have exceeded inflation.

*Covered employment includes government, but excludes railroads, self-employed and most ag employment.

Data from ES-202 (covered employment*) series
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Per Capita Personal Income

1999



Year	State Per Capita Income
1970	3,558
1980	8,842
1990	15,524
1999	21,997

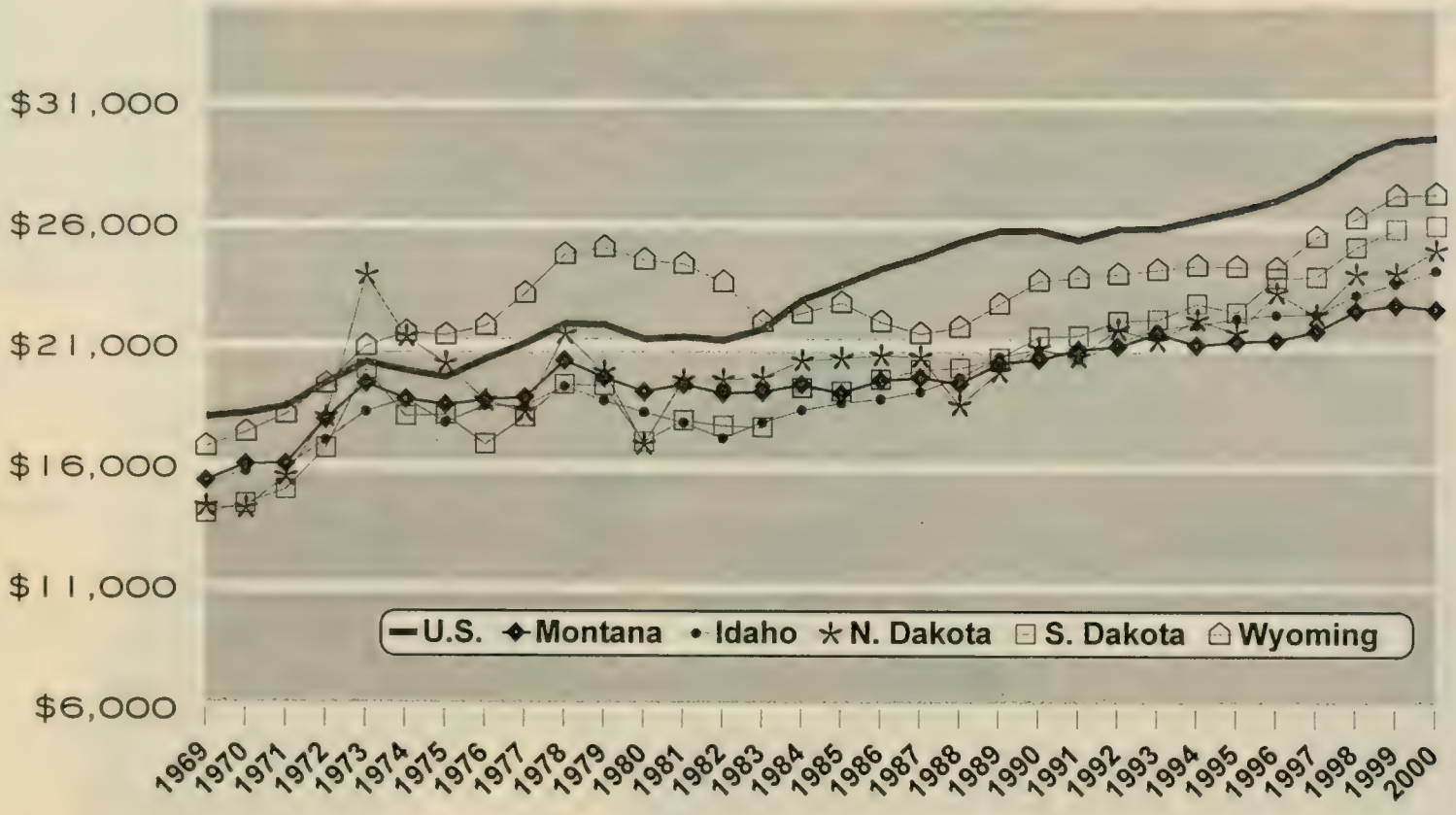
State Per Capita Income increased 3.2% over 1998; 1.0% increase after adjusting for inflation.

- Highest: Daniels $29,731
- Lowest: Big Horn $13,386
- Closest to State Average: Dawson $21,887

Data from U.S. Department of Commerce, Bureau of Economic Analysis
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Per Capita Personal Income

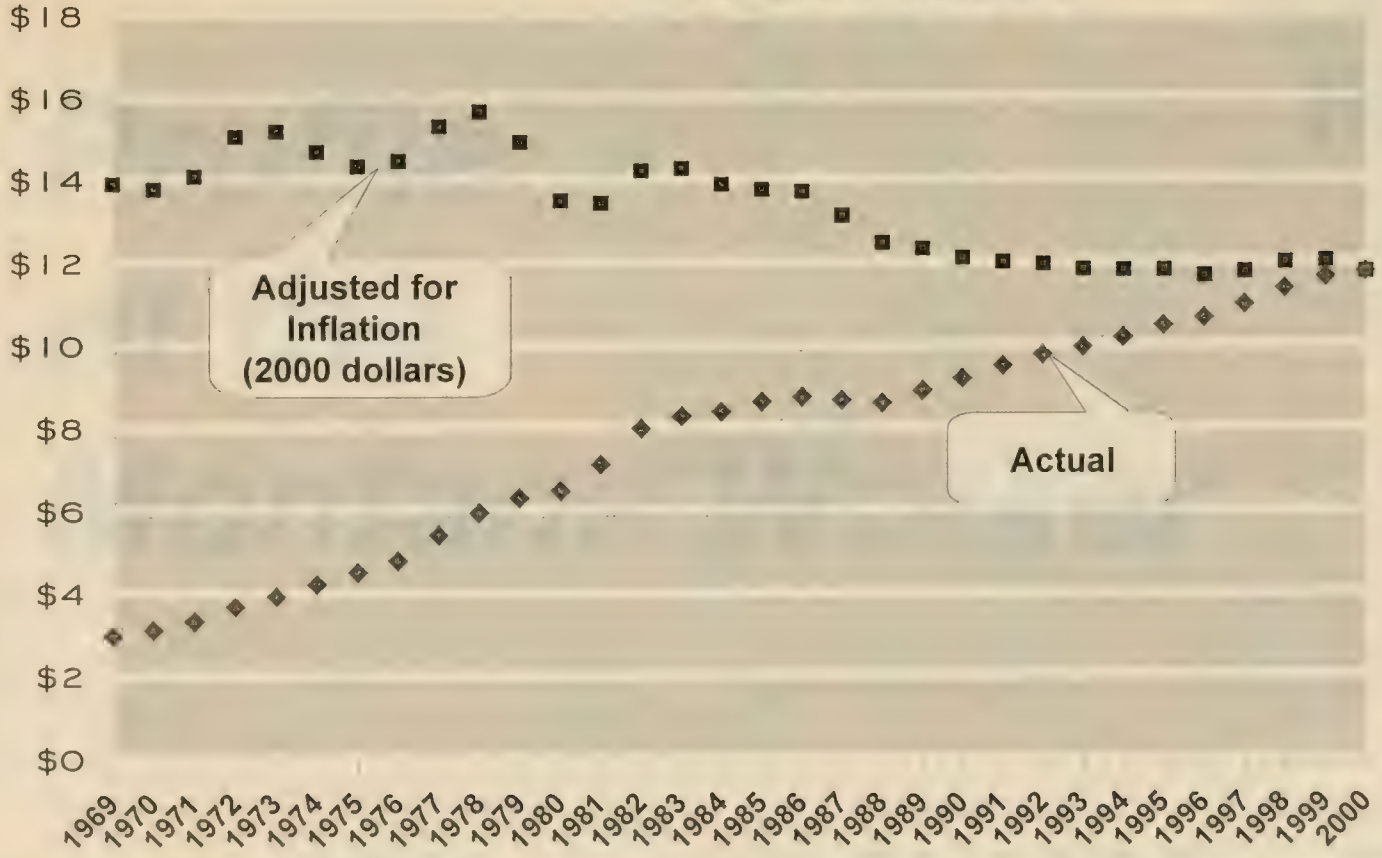
1969 - 2000 Adjusted for Inflation (2000 dollars)



Montana ranked 46th in the nation for 2000, according to preliminary data.

Data from U.S. Department of Commerce, Bureau of Economic Analysis
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Annual Average Hourly Earnings
Montana Private Nonfarm Nonsupervisory Jobs
1969 - 2000



When adjusted for inflation, nonsupervisory workers' hourly wages showed a 27-cent decrease between 1999 and 2000.

Data from Current Employment Statistics Series
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

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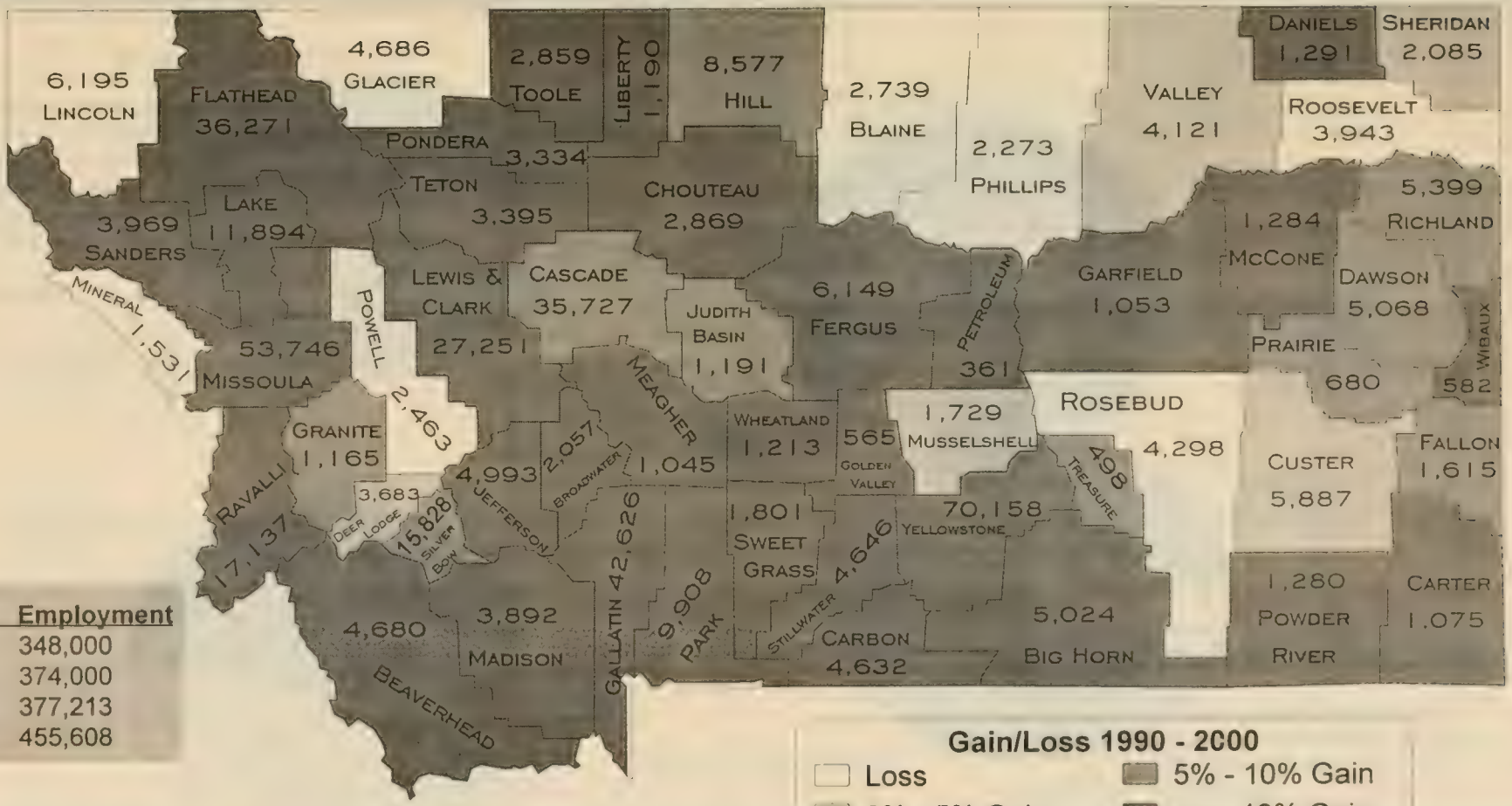
Profile of the Montana Worker

Where We Work . . .

Annual Average Total Employment

2000



Year	Employment
1980	348,000
1985	374,000
1990	377,213
2000	455,608

Gain/Loss 1990 - 2000

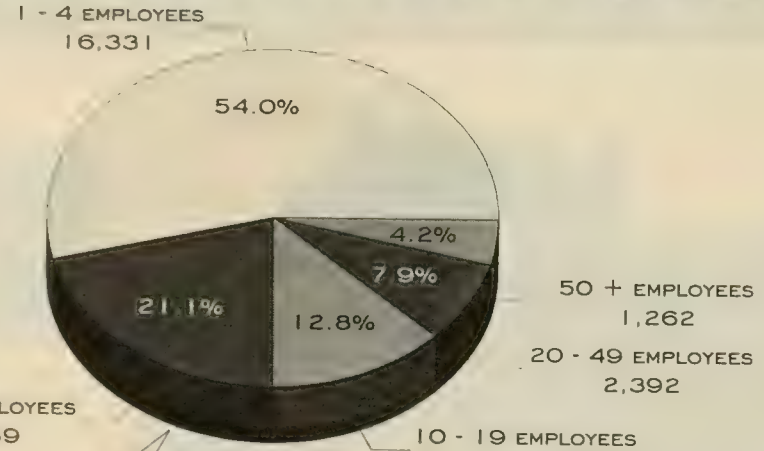
- Loss
- 0% - 5% Gain
- 5% - 10% Gain
- over 10% Gain

48 of 56 counties showed growth. State Employment Total: 455,608 Gain 1990 - 2000: +20.8%

Data from Local Area Unemployment Statistics series
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

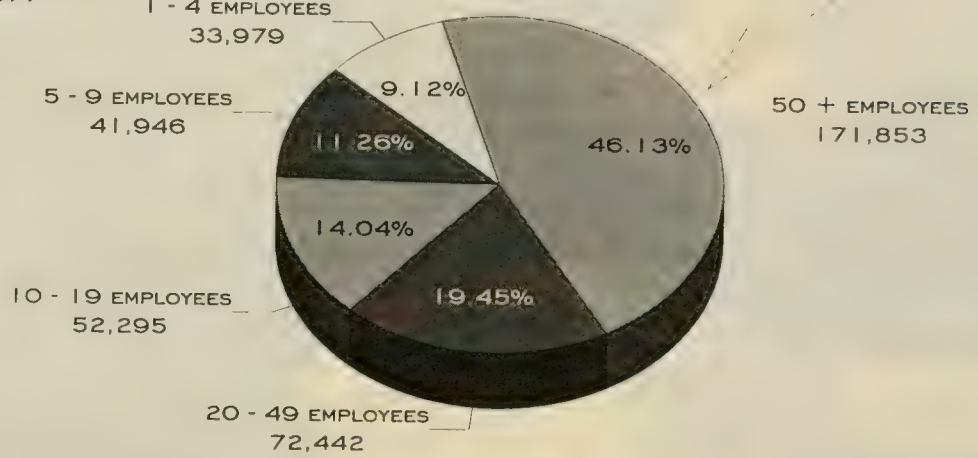
Montana Employment* by Work Site Size

Size Class Based on March 2000 Employment Data



Number of Business Work Sites

- Over half of Montana's business work sites have fewer than 5 employees.
- 88% of Montana's business work sites have fewer than 20 employees.
- Only 4.2% of Montana's business work sites have 50 or more employees.



Number of Employees

- Almost half of Montana's employees work at 4.2% of the work sites (those with 50+ employees).
- 66% of Montana's employees work at 12.1% of Montana's work sites.

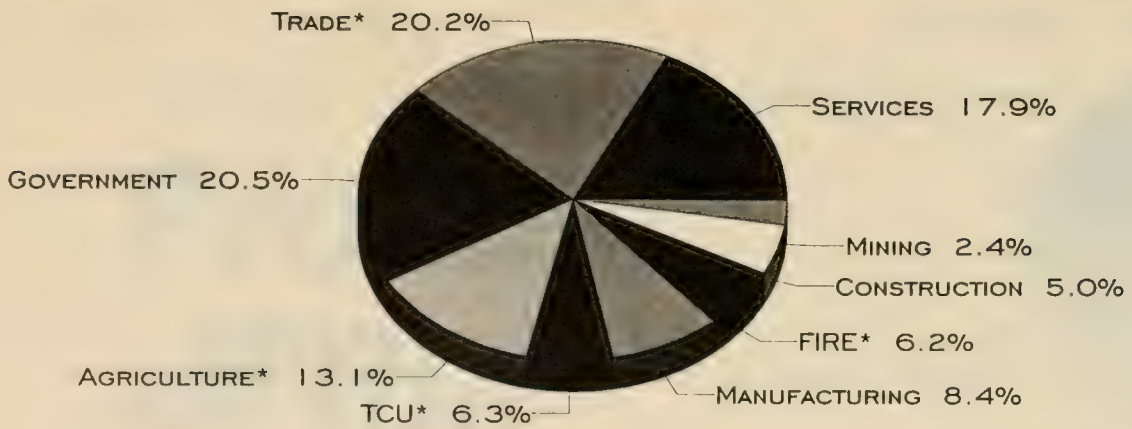
From March 1999 - March 2000, there was a net increase of 171 work sites and 9,575 employees.

***Covered employment includes government, but excludes railroads, self-employed and most ag employment.**

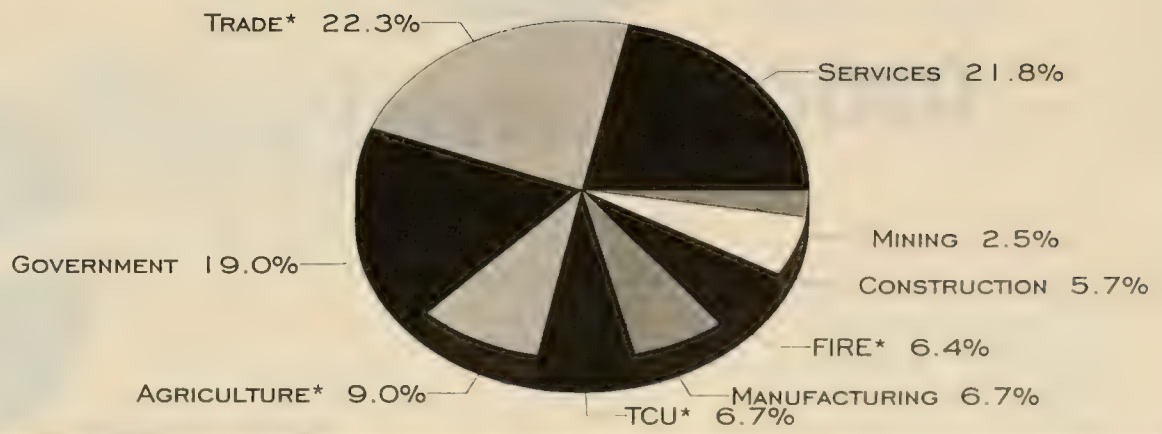
Data from ES-202 (covered employment*) series
Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Montana Employment

1970



1980

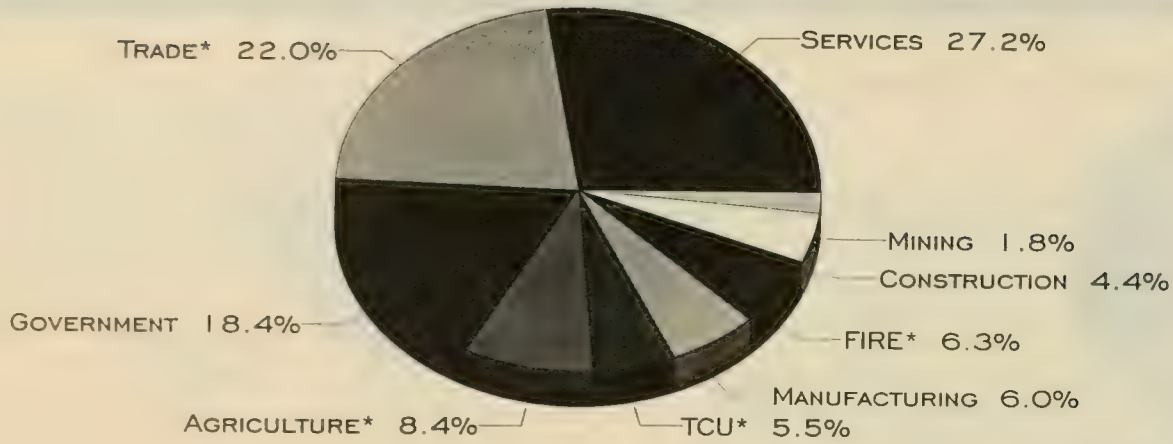


Agriculture, Government and Manufacturing dropped as a percent of total employment between 1970 and 1980.

*Agriculture = Ag, Forestry, Fishing, Hunting
*FIRE = Finance, Insurance & Real Estate
*Trade = Wholesale/Retail Trade
*TCU = Transportation, Communications & Utilities

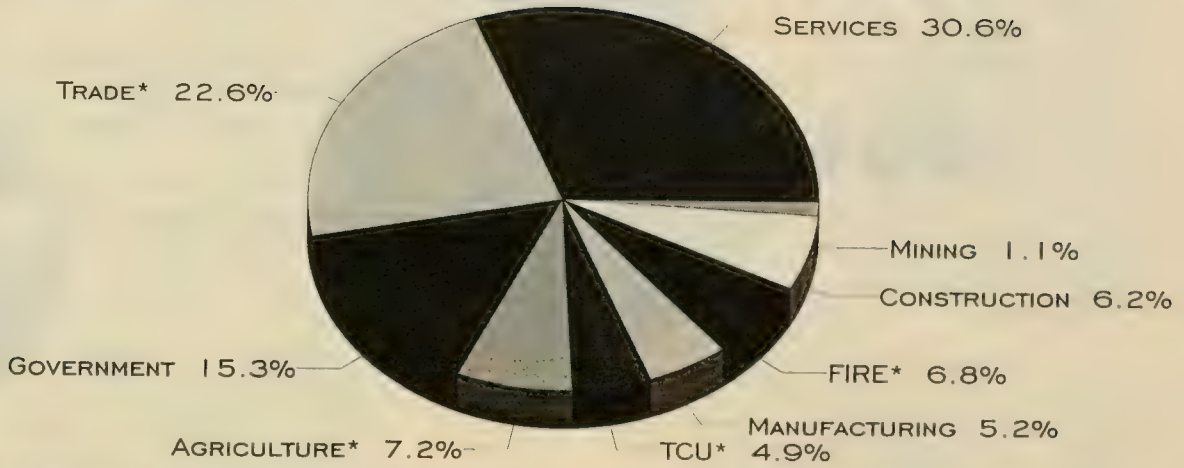
Data from U.S. Bureau of Economic Analysis, jobs include self-employment

Montana Employment



1990

2000



Agriculture, Government, Manufacturing, Mining & TCU employment dropped as a percent of total employment between 1990 and 2000.

*Agriculture= Ag, Forestry, Fishing & Hunting
*FIRE = Finance, Insurance & Real Estate
*Trade = Wholesale/Retail Trade
*TCU = Transportation, Communications & Utilities

Data from U.S. Bureau of Economic Analysis, jobs include self-employment; 2000 estimates by Montana Department of Labor & Industry, Research & Analysis Bureau

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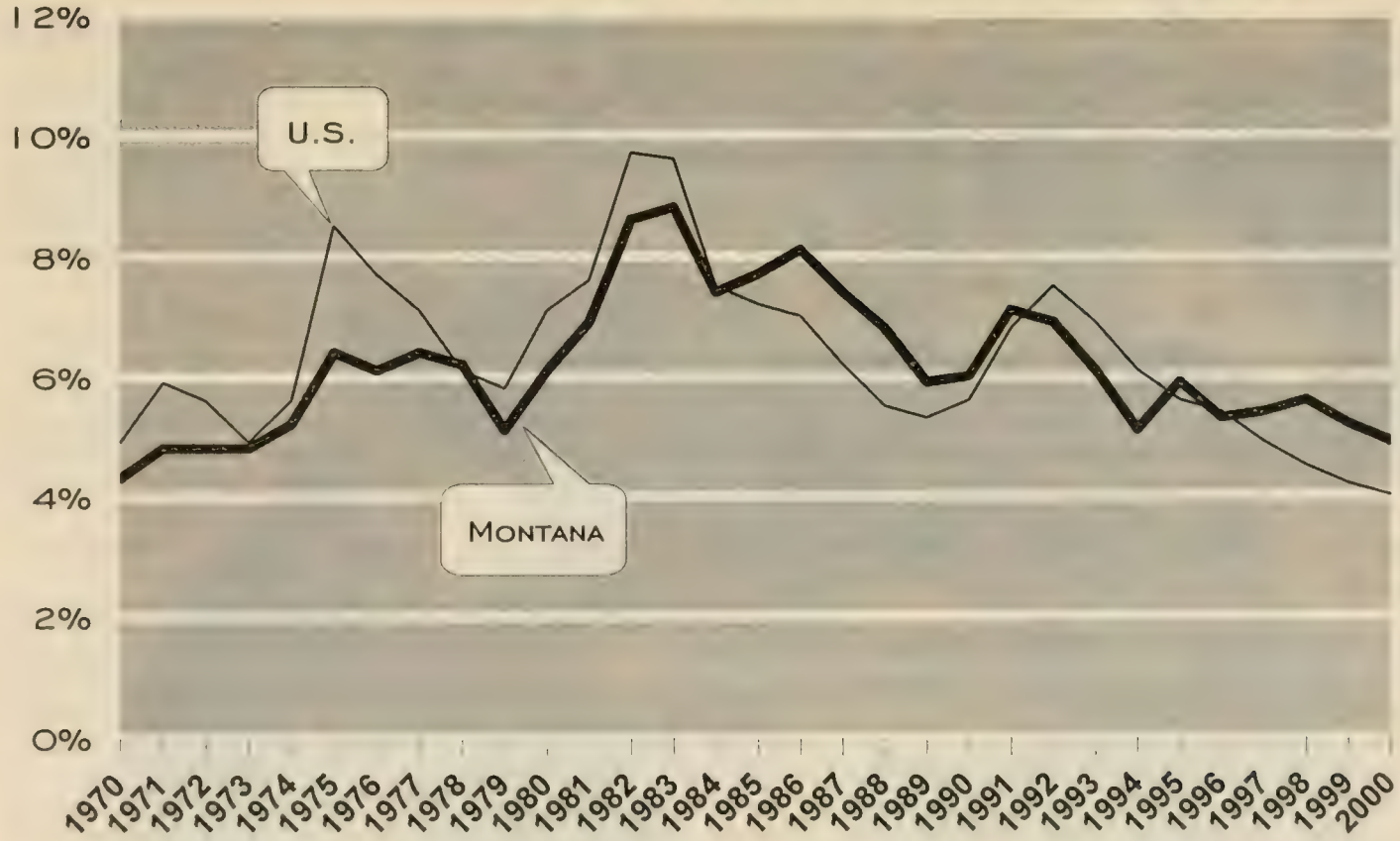
Montana Department of Labor & Industry

Profile of the Montana Worker

Challenges We Face . . .

Annual Average Unemployment Rate
Montana and U.S.

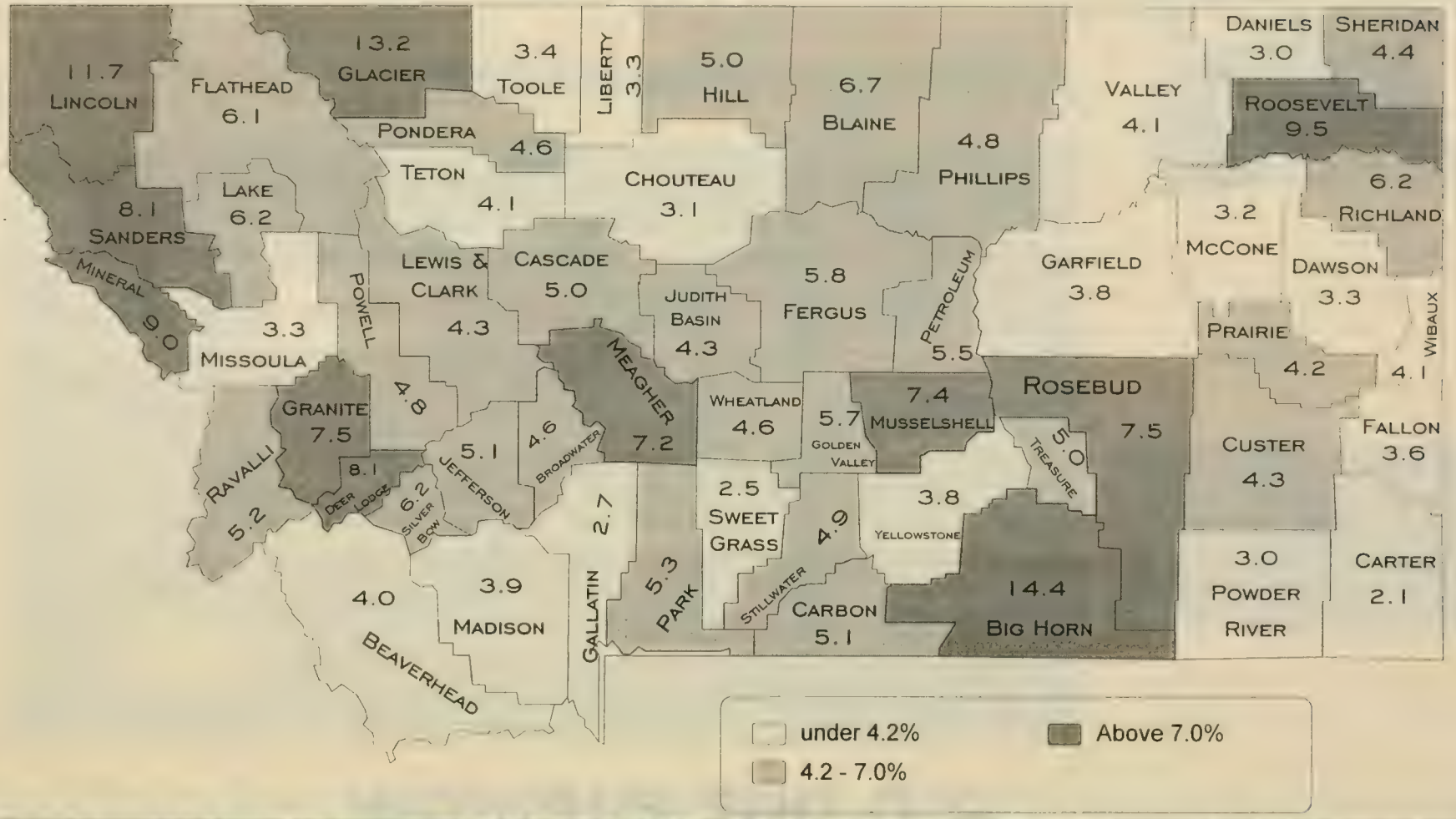


YEAR	MONTANA	U.S.
1970	4.3%	4.9%
1980	6.1%	7.1%
1990	6.0%	5.6%
2000	4.9%	4.0%

The Montana and U.S. unemployment rates have basically declined since the early 1980s.

Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

Annual Average Unemployment Rate 2000



11 counties showed high unemployment over 7%; 5 of the 11 counties are those with Indian Reservations.

Compiled by Montana Department of Labor & Industry, Research & Analysis Bureau

DEFINITIONS and PROGRAM DESCRIPTIONS

Census of Fatal Occupational Injuries

The Census of Fatal Occupational Injuries (CFOI) program, conducted in cooperation with the U.S. Department of Labor, is designed to collect information on all fatal occupational injuries.

Census of Population and Housing

The U.S. Department of Commerce, Bureau of the Census, conducts a national population census every 10 years. In 1990, every person and housing unit in the United States was asked certain basic demographic and housing questions (for example, race, age, marital status, housing value or rent). A sample of these persons and housing units was asked more detailed questions about such items as income, occupation and housing costs in addition to basic demographic and housing information. The data derived from the sample questions are estimates of the actual figures which would have been obtained from a complete count. The Census uses the same definitions of civilian labor force (CLF) employment and unemployment as the Local Area Unemployment Statistics (LAUS) program. The ***experienced unemployed*** are defined as those unemployed persons who have worked at any time in the past.

Covered Employment Program (ES-202)

The ES-202 report (produced by the Montana Department of Labor and Industry, Research and Analysis Bureau, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics) provides jobs and payroll data reported to the Montana Department of Labor and Industry by employers subject to Montana's unemployment insurance laws. Normally these employers are those whose annual payrolls exceed $1,000 in a calendar year. Agricultural employers are not covered unless they have another business that is covered or pay total cash wages of $20,000 or more in a calendar quarter or employ 10 or more workers in 20 different weeks in a calendar year. A ***work site*** is a single physical location at which one type of economic activity is predominantly performed. Employers who operate at two or more locations are requested to identify separately the employment and payrolls of each location, and each is classified as a separate work site.

Current Employment Statistics (CES-790)

The Current Employment Statistics (CES) program, conducted by the Montana Department of Labor and Industry, Research and Analysis Bureau, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, provides monthly estimates of a wide variety of employment and earnings information. The program estimates jobs by place of work (***establishment data*** or a ***count of jobs***) and covers full-time and part-time employees who worked during, or received pay for, the payroll period that includes the 12th of the month. Because this information comes from a survey of employers, persons who work for two different companies would be counted twice. Thus, nonagricultural employment is actually a count of the number of jobs filled, rather than the number of persons employed. CES data excludes the self-employed, volunteers, unpaid family workers and domestic workers. Persons who are on paid sick leave, vacations or holidays are considered employed. Payroll and worker-hour data are collected for private nonfarm wage and salary workers. (***Nonfarm wage and salary workers*** are employees who are production and related workers in manufacturing industries or nonsupervisory workers in private service-producing industries, construction and mining industries. Self-employed, owners and partners of unincorporated businesses, persons working in small agricultural operations, unpaid family members, workers on straight commission, some elected officials and domestic employees are excluded.) Earnings figures are "gross" figures — that is, they reflect changes in hourly wage rates. The payroll data includes pay for overtime, shift premiums, holidays, vacations and sick leave. The payroll data excludes bonuses and fringe benefits. The hours figures relate to the hours for which pay was received, which is different from scheduled or standard work hours.

Local Area Unemployment Statistics (LAUS)

The LAUS program is conducted by the Montana Department of Labor and Industry, Research and Analysis Bureau, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics (BLS). In Montana, the program uses a statistical model, with data collected monthly through the Current Population Survey (CPS) as its major component, to compute labor force, employment and unemployment data. The LAUS program is the official BLS-approved series used to allocate federal funds and determine eligibility for federal assistance programs. It estimates employment and unemployment by place of residence (***residence data*** or a ***count of people***) and is not comparable to the place-of-work (establishment or count of jobs) data from the CES and ES-202 programs. LAUS data is calculated for the week that includes the 12th of the month. Total ***employment*** includes agricultural workers, unpaid family workers, domestic workers and the self-employed in addition to nonfarm wage and salary workers. The ***civilian labor force*** is those persons 16 years and older, defined as employed or unemployed, excluding members of the armed forces. ***Employment*** is defined as the number of people who, during the reference week, worked at least one hour for pay or profit, or 15 hours or more as unpaid family workers. ***Employment*** includes those who, although not working, had some job attachment and were not looking for work — including persons temporarily absent from a job due to illness, bad weather, vacation or labor dispute, whether or not they were in a pay status during their time off. ***Unemployment*** is defined as the number of people who did not work at all for an entire week, were both able and available to work, and (1) were looking for work or (2) would have looked for work, except that (a) they were waiting to return to a job from which they had been laid off, or (b) they were waiting to report to a new wage and salary job scheduled to start within the following 30 days (and were not in school during the week). The ***unemployment rate*** is the number of unemployed as a percent of the civilian labor force.

Occupational Employment Statistics (OES)

The OES survey is an annual mail survey (conducted by the Montana Department of Labor and Industry, Research and Analysis Bureau, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics) of a sample of nonfarm establishments to obtain wage and salary employment by occupation, plus wage rates. The Research and Analysis Bureau uses these data to develop occupational projections for nonfarm wage and salary workers.

Per Capita Personal Income

Per capita personal income (average income per person) is defined as annual total personal income of residents divided by the resident population as of July 1 of each year. ***Personal income*** is income received by persons from all sources — private and government wage and salary disbursements (payrolls), other labor income (basically, employer contributions for fringe benefits), farm and nonfarm proprietors' (self-employment) income, rental income of persons, personal dividend income, personal interest income, and transfer payments — less personal contributions for social security and other social insurance. Personal income is measured before the deduction of personal income taxes and other personal taxes, and, unless otherwise noted, is reported in current dollars with no adjustment made for price changes.

Survey of Occupational Injuries and Illnesses (OSH Program)

The Survey of Occupational Injuries and Illnesses is an annual survey conducted in cooperation with the U.S. Department of Labor to compile occupational injury and illness statistics. Excluded from the survey are self-employed individuals, farmers with fewer than 11 employees, private households employing domestic workers, and independent mining contractors. Employers regulated by other federal safety and health laws, and all local, state and federal government agencies are also excluded.

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